# **2012 RESIDENT STUDY**





3945 Greenbriar Stafford, TX 77477 www.ccrsurveys.com June 2012



## The Woodlands Residential Survey 2012

- Traditionally conduct survey every two years
- Township board approved questionnaire and RFP in February 2012
- Proposals received from four companies
- Companies reviewed and rated based on criteria in RFP
- Creative Consumer Research (CCR) scored highest in meeting the criteria to conduct the survey and was competitively priced
- Board approved CCR to conduct survey
- Survey conducted April 4-30, 2012



# **About the Survey Company**



#### **Creative Consumer Research**

For more than 30 years, Creative Consumer Research has been providing clients with high-quality research data and analysis at competitive prices.

- CCR's extensive experience crosses a multitude of industries that includes long-term relationships with clients such as: The Woodlands, First Colony, City of Sugar Land, City of Austin.
- CCR is different from most other full-service market research firms today in that:
  - All aspects of a study are conducted in-house by the company's own staff of market research professionals and data collection personnel;
  - The company has 13 years experience working with The Woodlands;
  - CCR's Senior Executive (Joyce Walter) and Research Analyst (Joy Durham) have been working with The Woodlands for 13 and 10 years, respectively.
- CCR's researchers have extensive experience and strong backgrounds in various research techniques, both qualitative and quantitative.



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## Agenda

- Objectives
- Methodology
- Respondent Profile
- Dialing Summary
- Conclusions and Recommendations
- Research Findings
  - 2012 Results
  - Comparison to Previous Surveys



### **Objectives**

- The major objective of this research project is to obtain resident opinions on various issues related to living in The Woodlands Township, including:
  - Satisfaction with available services;
  - Issues of priority;
  - Satisfaction with delivery of services;
  - Use of existing community facilities and amenities;
  - Identifying any changes occurring since the 2010, 2008, 2005, and 2004 Residents Surveys where appropriate.



## Methodology

• CCR conducted 1,061 telephone interviews with residents of The Woodlands Township:

•	Alden Bridge	N=151
•	Cochran's Crossing	N=151
•	Grogan's Mill	N=150
•	Panther Creek	N=151
•	Sterling Ridge	N=151
•	Indian Springs	N=126
•	College Park	N=127
•	Creekside Park	N=50
•	Town Center	N=2
•	Carlton Woods	N=2

For reporting purposes, Carlton Woods is grouped with Sterling Ridge



## Methodology

- Requirements for participation:
  - Currently reside in one of pre-listed villages in The Woodlands Township
  - Head of household
  - Live in single family residence
  - Respondent/family/household members do not work in:
    - Market Research
    - Advertising
    - Public Relations
  - Respondent/family/household members have never served on/in an Association/Board or been employed by The Woodlands Township



## Methodology

#### Sample source:

- Database of listed and unlisted households obtained by CCR
- Respondents informed of the study sponsor
- Given a telephone number to call with any questions
- Interviewing dates: April 4 30, 2012

#### CCR Responsibilities

### Significance testing

- 95% confidence level
- Performed for current year (2012) versus previous year (2010) results only in comparison section
- Differences between villages are <u>highlighted</u> for easy identification throughout the report



# **Respondent Profile**

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
GENDER									
Male	42%	36%	46%	47%	41%	41%	37%	39%	52%
Female	58%	64%	54%	53%	59%	59%	63%	61%	48%
AVERAGE RESPONDENT AGE	53	52	54	57	56	48	52	54	48
AVERAGE HOUSEHOLD INCOME	\$127,510	\$121,320	\$135,420	\$106,800	\$125,700	\$142,800	\$140,820	\$114,530	\$140,680
OWN CURRENT RESIDENCE	94%	94%	97%	91%	94%	92%	95%	91%	98%
AVERAGE NUMBER OF YEARS LIVED IN THE WOODLANDS									
Mean	11.39	9.73	12.99	15.56	16.27	7.42	11.11	8.63	4.71
Median	8.14	8.69	10.87	12.38	14.03	4.57	8.52	6.06	1.66
HOUSEHOLDS WITH NO CHILDREN	52%	48%	55%	66%	69%	36%	45%	52%	42%

# Total Sample Dialing Information

		% of Total
Disposition	# Dialings	Dialngs
No Answer	6298	19.32
Busy	1100	3.38
Answering Machine	15236	46.75
Wrong Number	505	1.55
Generic Call Back	463	1.42
Disconnect	3921	12.03
Appointment Call Back	1225	3.76
Initial Refusal	1859	5.70
Terminate in Middle	62	0.19
Language Barrier	73	0.22
Fax/Modem/Business	471	1.45
Qualified Refusal	109	0.33
Call Block/Blocked number	11	0.03
Over Quota	14	0.04
Complete	1061	3.26
Q1A - Not male/female head of household	9	0.03
Q2- Not Woodlands resident	31	0.10
Q3 - Do not live in a house	43	0.13
Q4 - Works for Woodlands or in marketing	101	0.31
Q5 - Do not live in accepted village	0	0
TOTAL DIALINGS	32,592	100.00

Ratio of Total Dialings to completed surveys							
31:1							
21:1							
21:1							
13:1							
16:1							
11:1							
10:1							
9:1							

\*For this study, it required 31 telephone dialings to get a completed interview with a resident



# Research Findings 2012 Results



# **Community Services**



## Community Assessment Rating/Services

- Overall, residents are satisfied with most of the provided services
  - Eleven of the 14 services average a 4 or 5 rating on a 5-point scale
    - At least 80% rate Pathways, Parks and Open Spaces, Recycling Collection, and Garbage Collection a 4 or 5; this is similar to past studies
  - 91% rate the Township as good to excellent in terms of services provided



# Rated Community Services a '4' or '5'

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Garbage Collection	91%	93%	91%	90%	93%	87%	93%	91%	92%
Recycling Collection	91%	91%	91%	85%	91%	92%	88%	93%	96%
Parks and Open Space	89%	90%	91%	85%	92%	90%	88%	83%	94%
Pathways	82%	81%	86%	79%	82%	86%	86%	74%	75%
Streetscape Maintenance	77%	79%	77%	70%	77%	79%	85%	75%	81%
Recreation Facilities	76%	77%	76%	67%	75%	82%	77%	69%	92%
Fire Department	75%	70%	79%	72%	80%	78%	75%	76%	69%
General Law Enforcement	73%	75%	72%	69%	74%	71%	74%	74%	69%
Emergency Medical Services	69%	64%	72%	73%	74%	70%	67%	69%	62%
Recreation Programs	67%	78%	70%	63%	65%	71%	67%	54%	75%
Traffic Enforcement	61%	66%	64%	59%	58%	63%	61%	57%	63%
Swimming Pools	59%	60%	58%	51%	55%	69%	63%	57%	69%
Deed Restriction Enforcement	57%	58%	61%	45%	52%	63%	60%	57%	73%
Neighborhood Watch	40%	38%	41%	32%	44%	50%	35%	37%	42%



# Rating Services Provided by The Woodlands Township

#### 91% Excellent/Very Good/Good

						Sterling Ridge/			
	Total Sample	Alden Bridge	Cochran's Crossing	Grogan's Mill	Panther Creek	Carlton Woods	Indian Springs	College Park	Creekside Park
Excellent	(N=1061) 33%	(N=151) 35%	(N=151) 37%P	(N=150) 30%	(N=151) 26%	(N=153) 36%	(N=126) 36%	(N=127) 29%	(N=52) 38%
Very good	39%	38%	44%	37%	39%	38%	43%	35%	42%
Good	19%	17%	13%	19%	24%C	20%	17%	23%	17%
Fair	6%	6%	5%	10%l	8%l	5%	2%	9%l	2%
Poor	2%	3%	1%	3%	3%	2%	2%	2%	0%

# Rating Tax Rate Overall in Terms of Value for the Money

#### 59% Excellent/Very Good/Good

						Sterling			
						Ridge/			
	Total	Alden	Cochran's	Grogan's	Panther	Carlton	Indian	College	Creekside
	Sample	Bridge	Crossing	Mill	Creek	Woods	Springs	Park	Park
	(N=1061)	(N=151)	(N=151)	(N=150)	(N=151)	(N=153)	(N=126)	(N=127)	(N=52)
Excellent	7%	6%	5%	10%	7%	7%	7%	7%	10%
Very good	20%	19%	22%	17%	21%	24%H	27%H	13%	17%
Good	32%	30%	36%	31%	26%	34%	33%	31%	35%
Fair	30%	32%	30%	28%	36%l	26%	24%	35%	23%
Poor	8%	7%	4%	11%C	7%	8%	6%	7%	13%

# Law Enforcement/Safety



#### Traffic Concerns

- 39% feel traffic enforcement has improved in the past year
  - 92% of residents feel it is somewhat to very important for The Township to continue paying for the additional enforcement

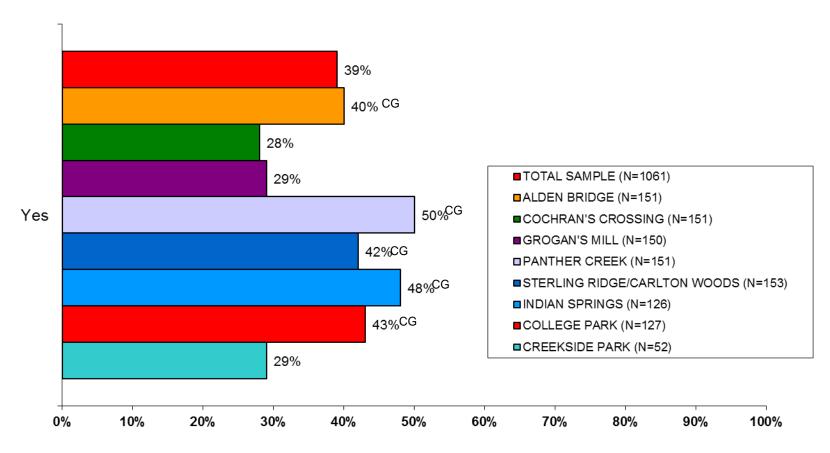


### Safety Issues

- The Woodlands Township residents feel less safe in some areas
  - They rate safety <u>highest</u> in their neighborhoods during the day and at Market Street, and <u>lowest</u> at the Woodlands Mall and on pathways
  - Safety along the Waterway was added this year and residents feel safe here (4.38)



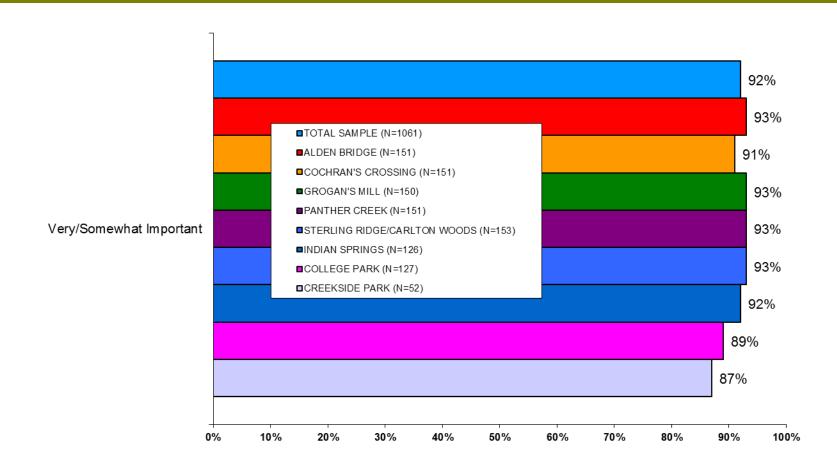
# Has Law Enforcement Visibility Improved in Past Year?





Q10. Closed-ended

# Important to Continue Paying for Enhanced Law Enforcement





### **Covenants/Deed Restrictions**

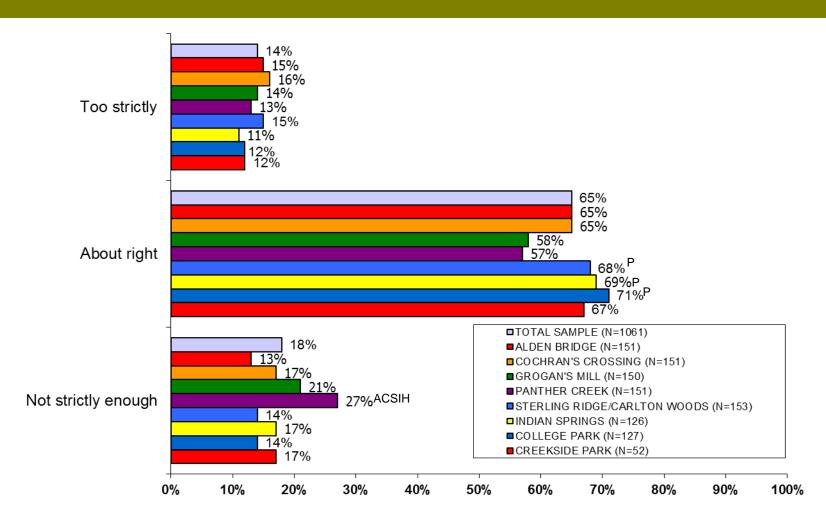


#### **Deed Restrictions**

- Overall, residents are satisfied with the enforcement of deed restrictions
  - 95% feel deed restriction enforcement is somewhat to very important
  - 85% indicate that the enforcement of deed restrictions is very or somewhat effective
  - 65% feel that the level of deed restriction enforcement is "about right"
    - About two in ten state it is too strict



# Feel That Deed Restrictions Are Enforced...





Q15. Closed-ended

#### **Deed Restrictions**

- Few (16% or 167 residents) have filed a complaint about deed restrictions
  - 42% of the 167 who filed a complaint are <u>satisfied</u> with the response to their filed complaint
  - However, 28% are <u>not at all satisfied</u> with how their complaint was handled
- 33% say they received a letter about a violation
  - 59% of these 351 who received a letter about a violation are satisfied with the response to or resolution of the situation



#### **Deed Restrictions**

- 39% applied to make property improvements through the RDRC
  - Harper's Landing and Alden Bridge residents made the fewest applications compared to other areas
  - 78% of those who applied are somewhat/very satisfied with The Township's response to this application



# Communications



# The Woodlands Community Magazine

- 94% recall receiving The Woodlands
   Community Magazine. Of those who reported receiving or using it for community information:
  - 54% read all or most of the contents
  - 82% indicate that the magazine is an effective information source



## **Communication with Staff**



## **Township Staff**

- The Township Staff provides residents quality service
  - In the past 2 years, 29% contacted a Staff Member.
    The Staff rates well on all aspects on a 5-point scale
    with a 5 being 'Excellent,' especially for courtesy and
    professionalism:
    - Courtesy: 4.12
    - Professionalism: 4.04
    - Helpfulness: 3.86
    - Timeliness of response: 3.74
    - The Deed Restrictions/Residential Design Review Committee and Parks/Recreation departments are the most contacted
    - Most contact the Staff member by telephone or in person but many also email the Staff



# **Local Governance**



#### Involvement

- Residents look to The Township to provide safety and security
- About half (49%) are satisfied with the current level of input and influence they have in the local government
  - About one-third (30%) are neither satisfied nor dissatisfied with the amount of input they have with their new government



# Most Important for The Township to Provide

						Sterling Ridge/			
	Total	Alden	Cochran's	Grogan's	Panther	Carlton	Indian	College	Creekside
	Sample	Bridge	Crossing	Mill	Creek	Woods	Springs	Park	Park
	(N=1061)	(N=151)	(N=151)	(N=150)	(N=151)	(N=153)	(N=126)	(N=127)	(N=52)
Safety	41%	44%H	43%	34%	38%	52%GPH	44%	32%	44%
Security	18%	17%	18%	17%	15%	25%PH	23%H	11%	17%
Emergency and fire services	9%	8%	9%	9%	11%	7%	6%	13%	10%
Clean environment/neighborhood	9%	7%	10%	11%	7%	10%	9%	10%	13%
Waste management and garbage pick-up	8%	10%	11%	7%	6%	7%	10%	7%	12%
Maintaining parks and recreation	8%	12%	7%	10%	5%	8%	7%	6%	12%
Traffic control/flow	8%	7%	12%H	7%	10%	9%	13%H	5%	0%
Deed restriction enforcement	7%	5%	5%	12%ACP	4%	7%	6%	6%	4%
Maintain value of homes/property	7%	10%	3%	7%	5%	6%	9%	8%	6%
Maintain appearance of homes and	6%	8%	20/	7%	7%	6%	60/	20/	69/
businesses	0%	0%	3%	170	1 %	0%	6%	3%	6%



### Development

- The Woodlands Township residents welcome economic development
  - A majority (84%) state continued economic development is important
  - 82% agree that new corporations in The Township are great for the area's economy and create more benefits than burdens for The Township



## **The Community**



## Aspects Residents Like about The Woodlands Township

- The Woodlands Township residents name the environment/aesthetics as the most beloved aspect of living in The Woodlands
  - This includes greenery, plants, trees, and overall beauty of the area
    - Being conveniently located, safe, and having parks are also well liked aspects of The Township



#### **General Areas of Concern**

- The top area for improvement is traffic control
  - Although there is no real consensus as to the most important issue facing residents, "don't know," taxes, traffic congestion, and law enforcement/crime are the top mentions



# Aspects Liked about Living in The Woodlands

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Appearance/beauty of area/trees/greenery	36%	32%	42%H	40%H	34%	33%	40%H	27%	44%
Conveniently located to everything	22%	26%CS	17%	20%	24%S	15%	23%	32%CGS	17%
Safe	20%	18%	19%	15%	13%	34%*	19%	22%	17%
Parks/woods/parkways/open spaces	17%	17%	19%	18%	17%	14%	17%	13%	31%
Nice/friendly neighbors/people	14%	14%	16%P	13%	8%	14%	15%	17%	13%
Family atmosphere	13%	15%	13%	11%	11%	20%IH	10%	8%	15%
Appearance/aesthetics/neat/clean	14%	20%CGPS	11%	11%	9%	12%	13%	20%	13%
Quiet/peaceful	10%	9%	11%	10%	7%	10%	6%	14%l	12%
Quality of life/lifestyle	10%	11%	7%	12%	11%	10%	10%	6%	15%
Has everything you need	10%	11%	10%	10%	13%	11%	10%	9%	8%
Schools/quality of education	9%	8%	8%	7%	7%	16%ACGPI	8%	10%	6%
Shopping/restaurants/ entertainment	9%	13%CS	4%	9%	12%C	7%	10%	10%C	13%



Q37. Open-ended question

## What Would Add/Remove to Improve The Woodlands

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Don't know	38%	46%PS	42%	39%	33%	34%	37%	39%	38%
Traffic control	15%	14%	18%	13%	18%	16%	15%	18%	4%
Better law enforcement/lower crime	5%	3%	2%	5%	6%	7%C	2%	4%	10%
Slow construction/commercial businesses	4%	5%H	5%H	2%	7%GH	5%H	5%	1%	4%
Stop cutting down trees	4%	3%	7%GS	1%	7%GS	2%	5%	5%	6%
Slow overpopulation/too crowded	4%	6%P	6%P	7%P	1%	3%	5%P	3%	4%

## Research Findings - Comparison to Previous Surveys

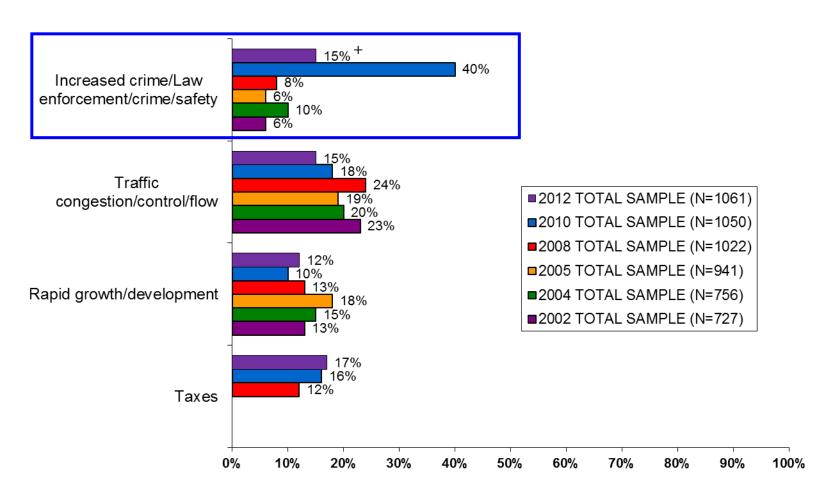


#### **Changes Since Previous Years**

- Most Important Issues
  - Increased crime/law enforcement, safety concerns fell to pre-2010 levels; (15%) in 2012, from 2010 (40%)
  - Traffic flow and congestion concerns continued to fall in 2012 (15%) from 2010 (18%)
- Satisfaction
  - 2012 excellent satisfaction ratings with services rose to 33% in 2012 from 25% in 2010

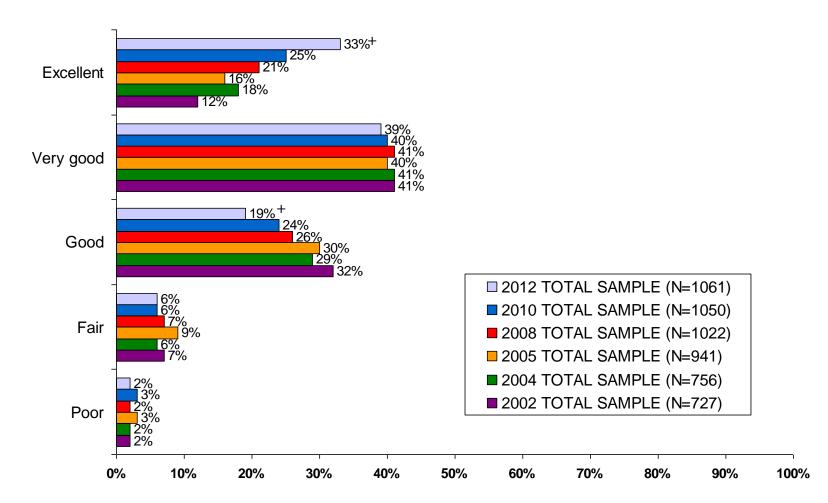


## Most Important Issues Facing The Woodlands Residents





### Satisfaction with Services Provided by Township





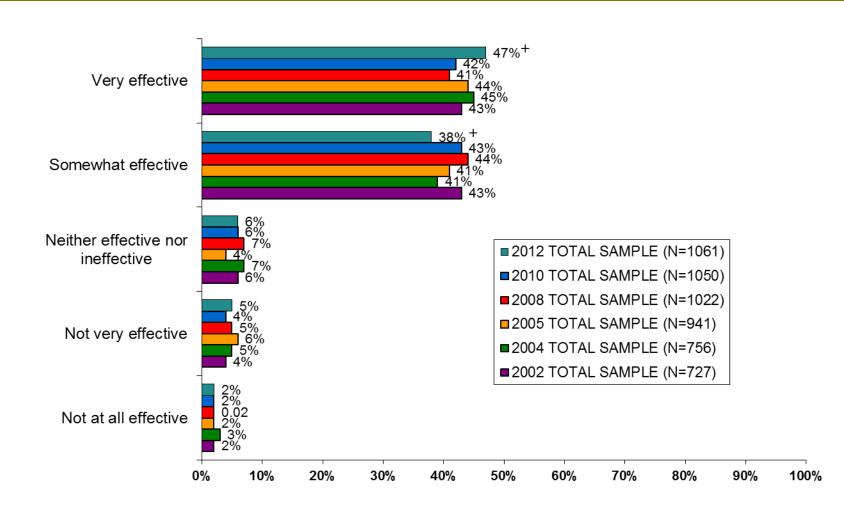
Q8. Closed-ended rating question

#### **Changes Since Previous Surveys**

- Deed Restrictions
  - Consistent with previous surveys, residents continue to perceive that deed restriction enforcement is effective
    - However, a shift occurred from somewhat to very effective ratings
  - A majority of residents (65%) continue to state that deed restrictions are enforced about right
    - Of those who contacted The Township staff to complain, 19% were very satisfied with the response; a shift from 2010 (24%)
      - Similar to the previous survey, 28% are not at all satisfied with the results this time



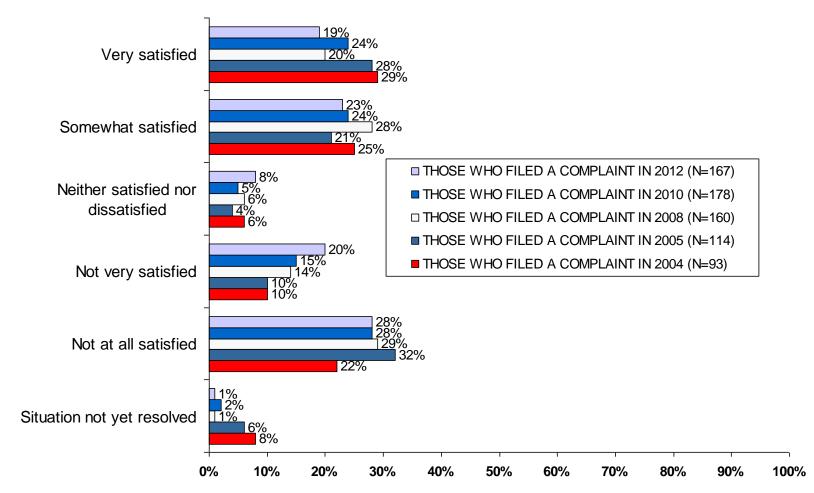
#### Effectiveness of Enforcement of Deed Restrictions





Q16./Q13. Closed-ended

## Satisfaction with Response to Complaint Filed





Q20./Q17. Closed-ended

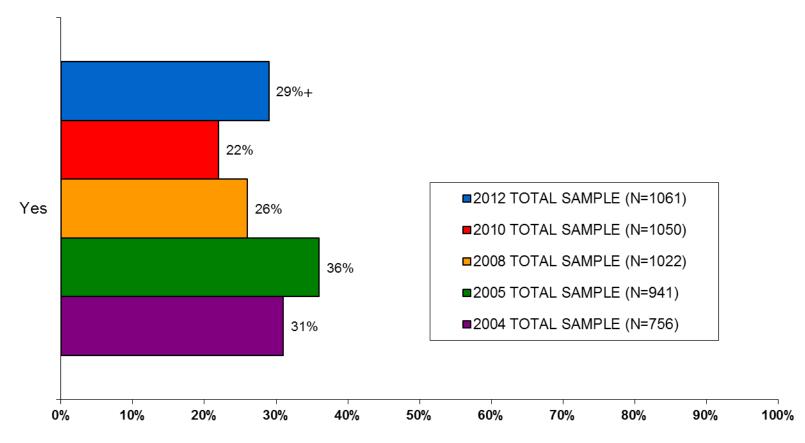
#### **Changes Since Previous Studies**

#### Communication

- Use of The Woodlands Community Magazine as a source of community activities remained consistent with 2010
  - Most continue to report receiving The Woodlands Community Magazine
  - Of those receiving the magazine, most read at least some of it
  - More (25%) compared to 2010 (20%), said they read all of it
- Twenty-nine percent report contacting The Township Staff in 2012; reversing the declining trend from 2005
  - Overall ratings for Staff are more positive and residents rate timeliness as significantly better



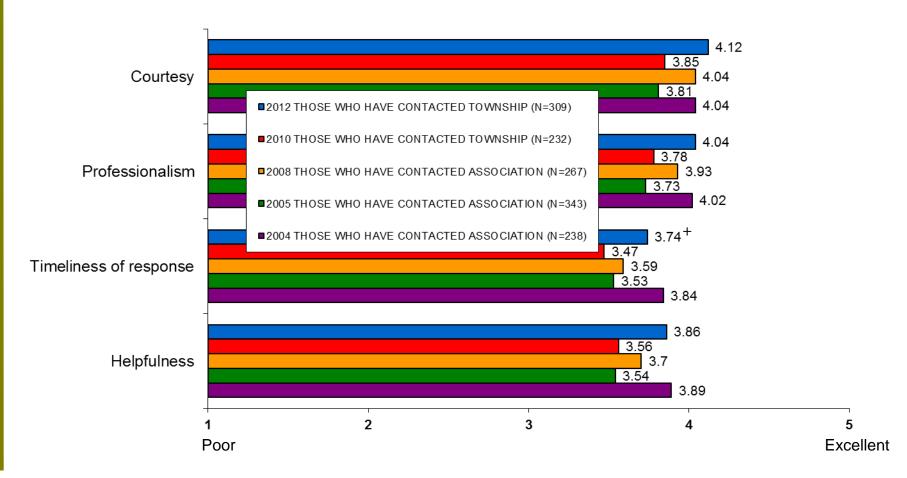
# In Past 2 Years, Have Had Personal Communication With Member of the Staff





\*Note: Prior to 2010 stated past 5 years

# Rating Staff Based on Communication (1 = Poor; 5 = Excellent)





### Conclusions



#### Conclusions

- Many concerns that arose in the 2010 survey have subsided to pre-2010 standings while satisfaction levels with staff and services have risen
- As in past years, residents of The Woodlands Township continue to be pleased with living in The Township overall
  - The surrounding beauty, convenient location, and sense of safety contribute to the continued satisfaction levels
- Residents continue to rely on hometown publications such as The Woodlands Community Magazine and The Villager for community information
- Residents are highly satisfied with the services The Township provides
  - Residents welcome economic development